

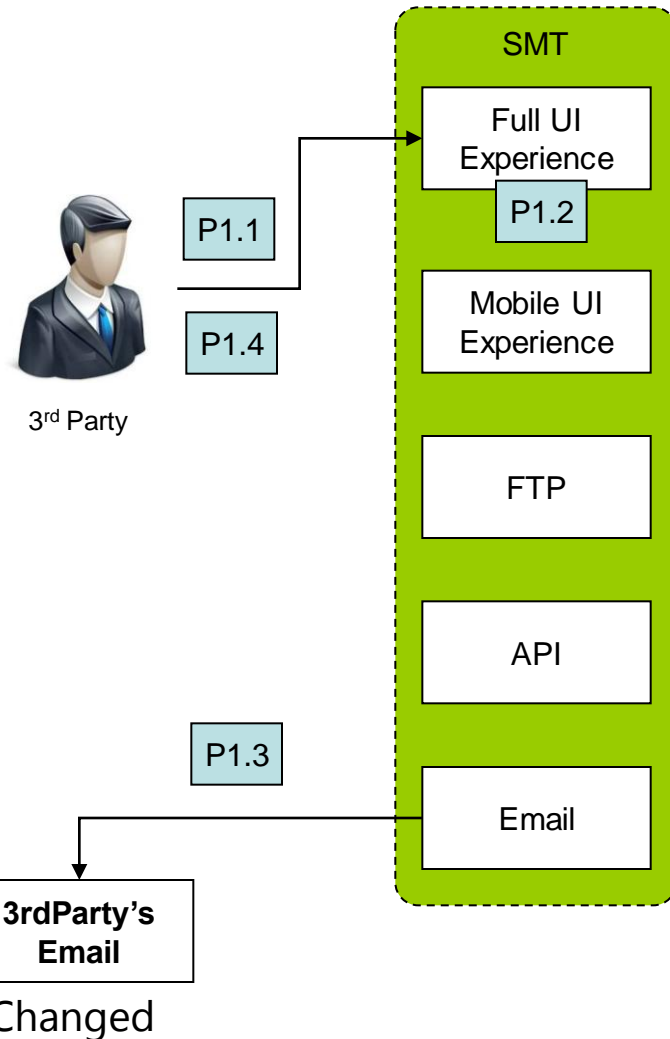
*'Access, Control
& Convenience'*

3rd Party Registration, Account Management and Usage - UI Experience & Permissions

Processes and Storyboards

May 29, 2012

3rd Party Registers for SMT Process



Primary Storyboard

P1.1 3rd Party user registers - sub storyboards apply

P1.2 SMT gives success message on the UI

P1.3 SMT sends email to the 3rd Party User with temporary password

P1.4 3rd Party links back to SMT UI to set permanent password and secret question and answer

Sub storyboards for P1.1

P1.1.1 Register as a new 3rd Party & 1st Admin

P1.1.2 Register as an admin for an existing 3rd Party

P1.1.3 Register as a user for an existing 3rd Party

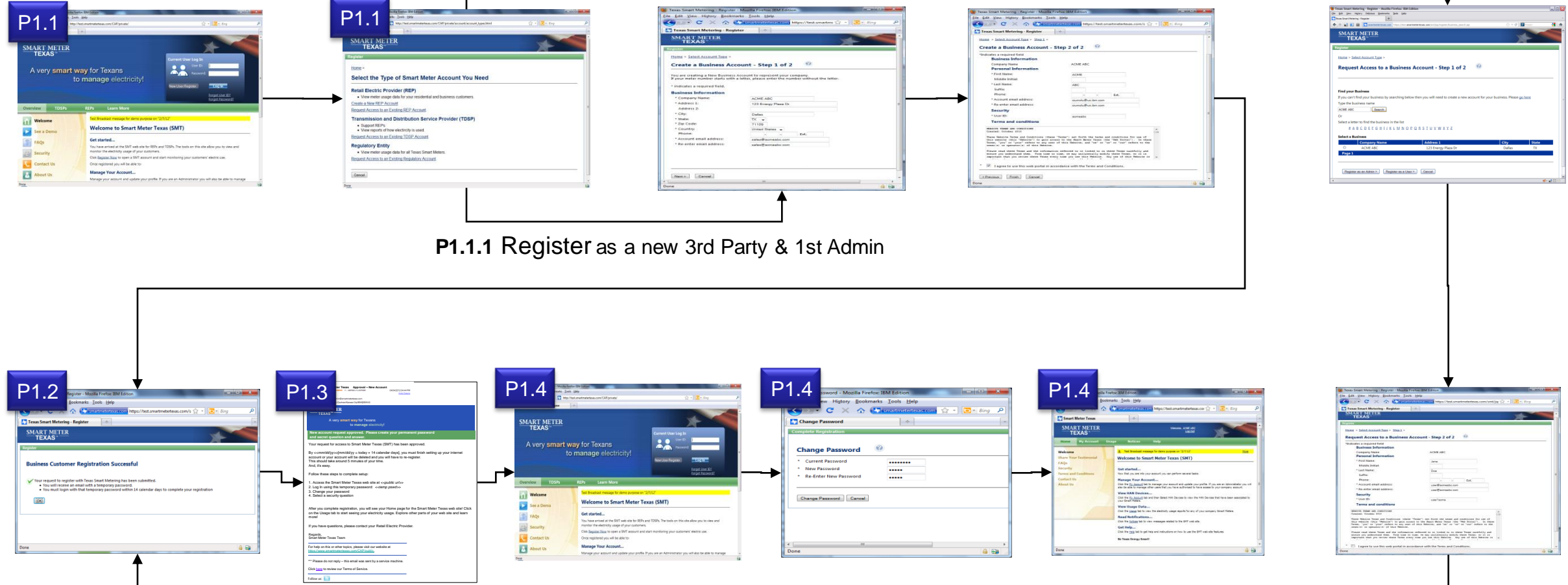
P1.1.4 3rd Party API on-boarding (3rd Parties will contact SMT Maintenance to set up API and FTPS connectivity (existing standard SMT process))

Notes:

- 3rd Parties will register from the SMT private site
- RORs do not need to reregister as 3rd Parties
- Businesses who wish to be 3rd Parties do need to reregister
- Standard registration and user business rules and lifecycle rules apply

3rd Party Registers for SMT Storyboard

P1.1.2 Register as an admin for an existing 3rd Party
P1.1.3 Register as a user for an existing 3rd Party



No change

3rd Party Registers for SMT Traceability Matrix

Functional Tracker	Business Requirement #	Business Requirement Description	3rd Party and Mobile #	Process Description
3rd Party	BR – 308	<ul style="list-style-type: none">▪ Ability for 3rd parties to have access to updated API process and procedure documentation	P1.1	<ul style="list-style-type: none">▪ 3rd Party API on-boarding
3rd Party	BR – 073	<ul style="list-style-type: none">▪ Ability to purge a 3rd party after 13 months of inactivity by all of their user id(s) and remove the 3rd party from associations they have and any drop lists they are on.	P1 Note	<ul style="list-style-type: none">▪ Standard registration and user business rules and lifecycle rules apply

3rd Party Registers for SMT

P1.1 3rd Party
user registers -
sub storyboards
apply



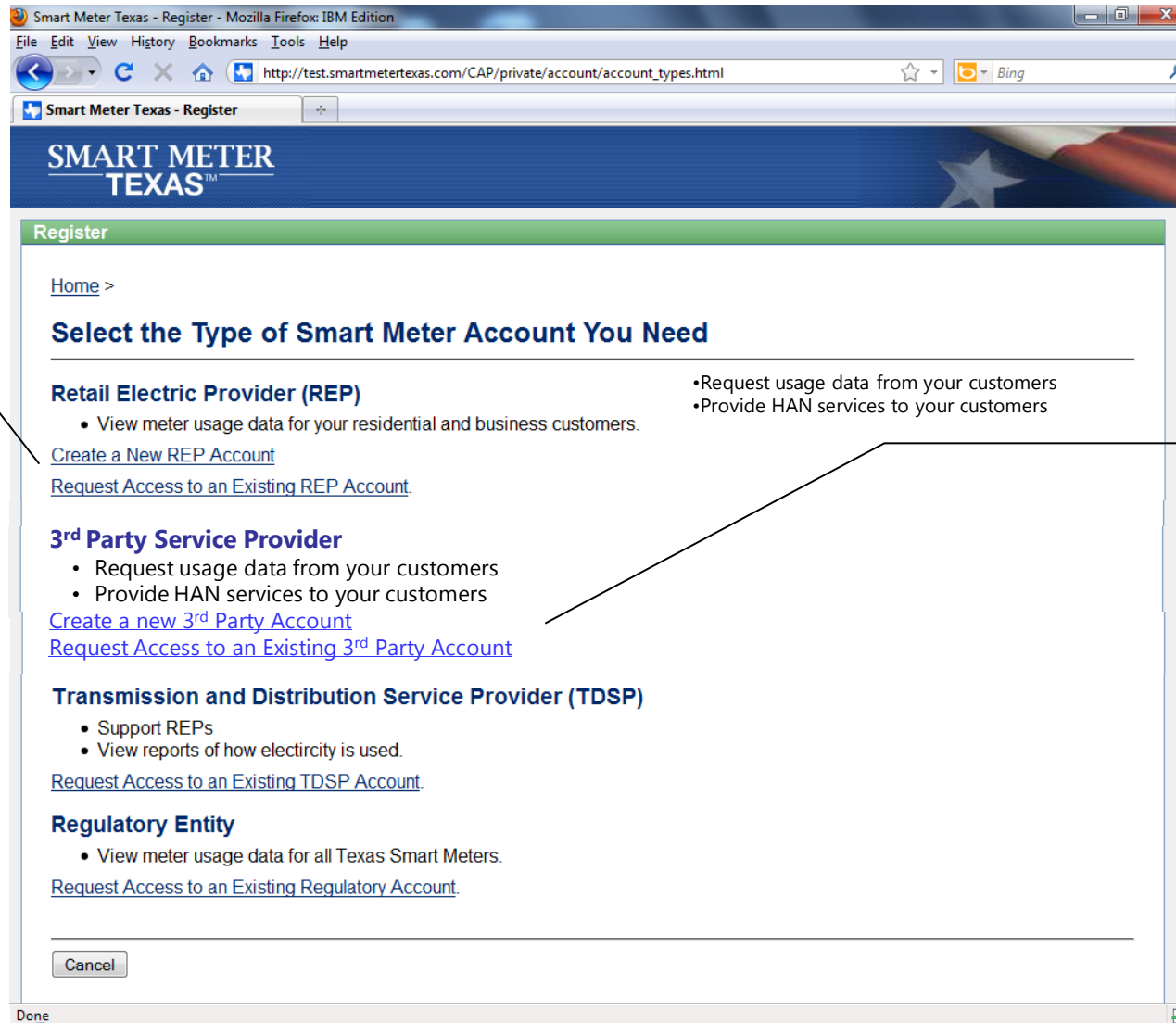
3rd Party will
be added to
the SMT
private site

No change

3rd Party Registers for SMT

P1.1 3rd Party user registers - sub storyboards apply

REPs will continue to register in the REP area, and will have 3rd Party capabilities under their existing accounts.



3rd Parties will register in the 3rd Party area.

No change

3rd Party Registers for SMT

P1.1.1 Register as a new 3rd Party & 1st Admin

Will add ability for 3rd Party to add logo and company contact information to Registration Process AND Company Profile. This will support 3rd Party recognition and credibility for the 1-Time LOA invite email

Texas Smart Metering - Register - Mozilla Firefox: IBM Edition

File Edit View History Bookmarks Tools Help

smartmetertexas.com https://test.smartme

Texas Smart Metering - Register

SMART METER TEXAS™

Register

Home > Select Account Type >

Create a 3rd Party Account - Step 1 of 2

You are creating a New Business Account to represent your company.
If your meter number starts with a letter, please enter the number without the letter.

* indicates a required field.

Business Information

* Company Name: ACME ABC

* Address 1: 123 Energy Plaza Dr

Address 2:

* City: Dallas

* State: TX

* Zip Code: 71109

* Country: United States

Phone: Ext.

* Account email address: sales@acmeabc.com

* Re-enter email address: sales@acmeabc.com

Next > Cancel

Done

Notes: 3rd Parties will need to obtain a DUNs to participate in SMT. This will address company name uniqueness.

Changed

3rd Party Registers for SMT

P1.1.1 Register as a new 3rd Party & 1st Admin

Texas Smart Metering - Register - Mozilla Firefox: IBM Edition

File Edit View History Bookmarks Tools Help

smartmetertexas.com https://test.smartmetertexas.com/s

Texas Smart Metering - Register

Home > Select Account Type > Step 1 >

Create a 3rd Party Account Step 2 of 2

*Indicates a required field

Business Information

Company Name ACME ABC

Personal Information

* First Name: ACME

Middle Initial:

* Last Name: ABC

Suffix:

Phone: - Ext.

* Account email address: ciuolu@us.ibm.com

* Re-enter email address: ciuolu@us.ibm.com

Security

* User ID: acmeabc

Terms and conditions

WEBSITE TERMS AND CONDITIONS
Created: October 2010

These Website Terms and Conditions (these "Terms") set forth the terms and conditions for use of this website (this "Website") to gain access to the Smart Meter Texas (the "Web Portal"). In these Terms, "you" or "your" refers to any user of this Website, and "we" or "us" or "our" refers to the owner(s) or operator(s) of this Website.

Please read these Terms and the information referred to or linked to in these Terms carefully and ensure you understand them. From time to time, we may unilaterally modify these Terms, so it is important that you review these Terms every time you use this Website. Any use of this Website is

* ☒ I agree to use this web portal in accordance with the Terms and Conditions.

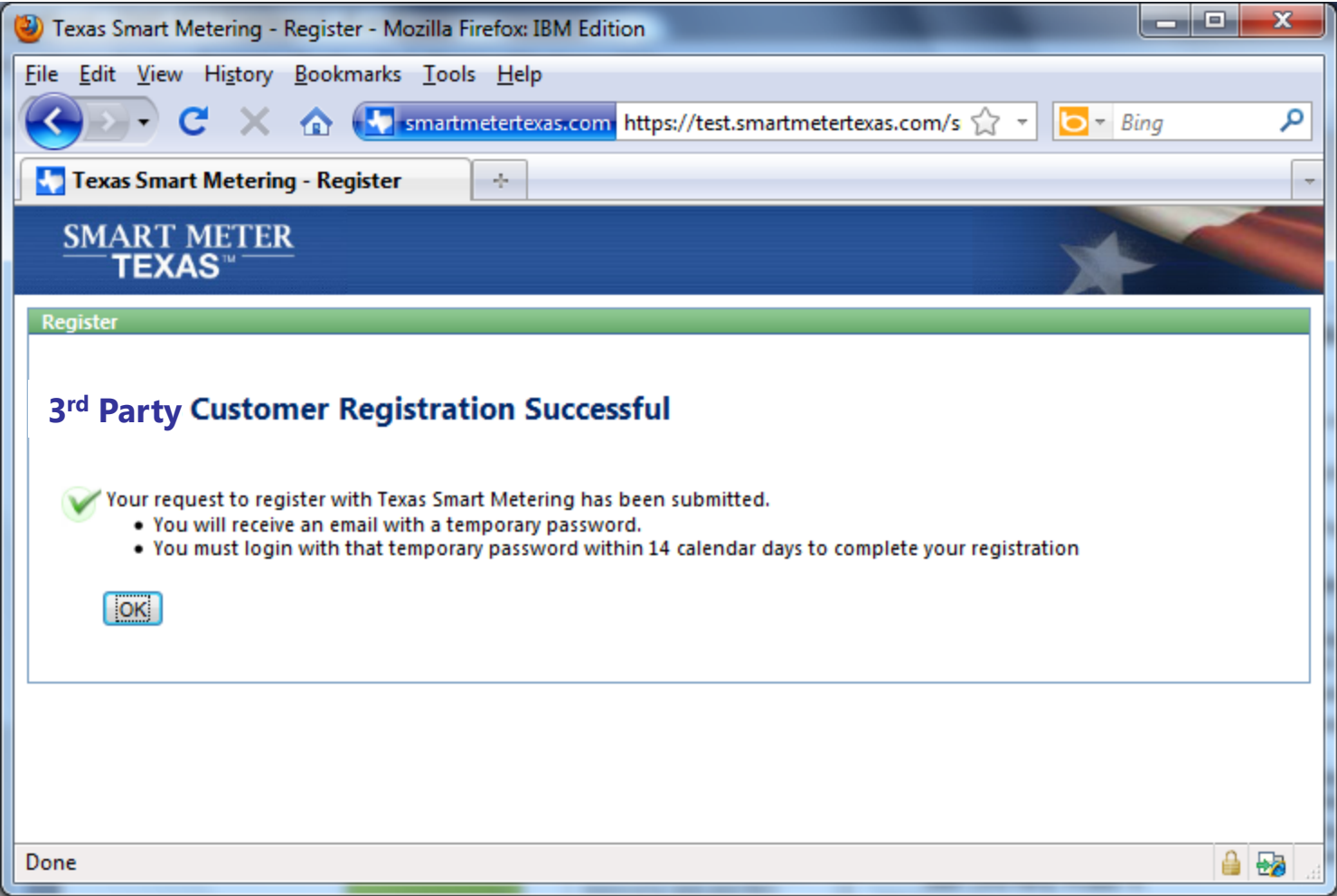
< Previous Finish Cancel

Done

Changed

3rd Party Registers for SMT

P1.2 SMT gives success message on the UI



3rd Party Registers for SMT

P1.3 SMT
sends email to
the 3rd Party
User with
temporary
password

Smart Meter Texas

Approval – New Account

Smart Meter Texas

From: smartmeter@smartmetertexas.com

To: James J. Cochran/Kansas City/SMARTMETER

SMART METER

TEXAS™

A very smart way for Texans

to manage electricity!

New account request approved. Please create your permanent password and secret question and answer.

Your request for access to Smart Meter Texas (SMT) has been approved.

By <<mm/dd/yy>>[mm/dd/yy = today + 14 calendar days], you must finish setting up your internet account or your account will be deleted and you will have to re-register. This should take around 5 minutes of your time. And, it's easy.

Follow these steps to complete setup:

1. Access the Smart Meter Texas web site at <<public url>>
2. Log In using this temporary password: <<temp pswd>>
3. Change your password
4. Select a security question

After you complete registration, you will see your Home page for the Smart Meter Texas web site! Click on the Usage tab to start seeing your electricity usage. Explore other parts of your web site and learn more!

If you have questions, please contact your Retail Electric Provider.

Regards,
Smart Meter Texas Team

For help on this or other topics, please visit our website at <https://www.smartmetertexas.com/CAP/public>.

*** Please do not reply – this email was sent by a service machine.

Click [here](#) to review our Terms of Service.

Follow us:

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3rd Party Registers for SMT

P1.4 3rd Party links back to SMT UI to set permanent password and secret question and answer

Change Password - Mozilla Firefox: IBM Edition

File Edit View History Bookmarks Tools Help

smartmetertexas.com

Change Password

Complete Registration

Change Password

* Current Password

* New Password

* Re-Enter New Password

Change Password Cancel

Done

No change

3rd Party Registers for SMT

P1.4 3rd Party links back to SMT UI to set permanent password and secret question and answer

Answer Security Question - Mozilla Firefox: IBM Edition

File Edit View History Bookmarks Tools Help

smartmetertexas.com

Answer Security Question

Complete Registration

Answer Security Question ?

*Indicates a required field

* Security Question What was your childhood nickname?

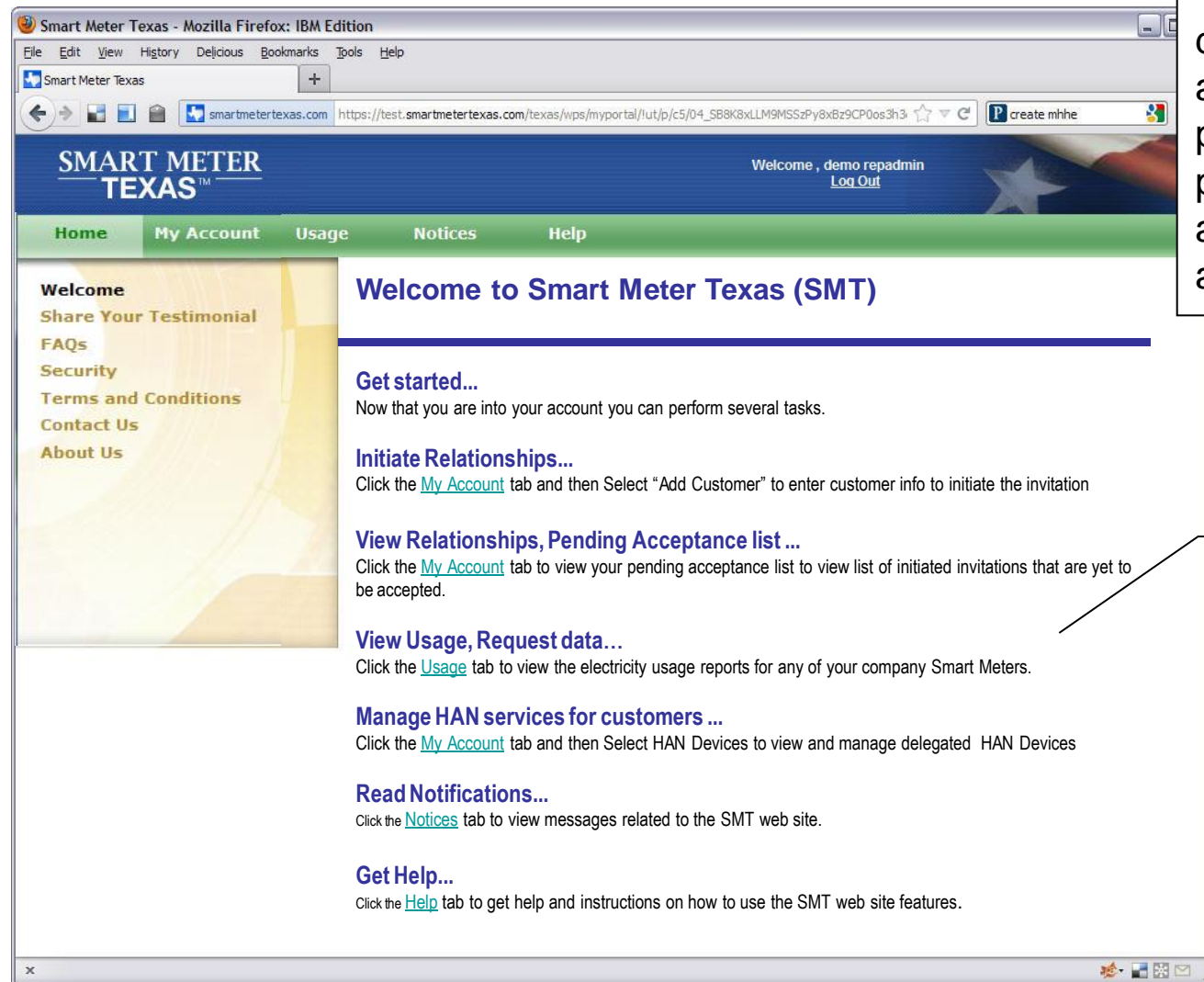
* Security Question Answer acme

Save Question

Done

3rd Party Registers for SMT

P1.4 3rd Party links back to SMT UI to set permanent password and secret question and answer



The 3rd Party user is dropped off on the authenticated landing page after creating permanent password and secret question and answer

Example authenticated 3rd Party landing page.

Final content to be determined in design

No change

3rd Party Registers for SMT

- P1.1.2** Register as an admin for an existing 3rd Party &

P1.1.3 Register as a user for an existing 3rd Party

Texas Smart Metering - Register - Mozilla Firefox: IBM Edition

Texas Smart Metering - Register

smartmetertexas.com
https://test.smartmetertexas.com/smt/jsp/register/business_search.jsp

SMART METER
TEXAS™

Register

Home > Select Account Type >

Request Access to a 3rd Party Account - Step 1 of 2

Find your Business

If you can't find your business by searching below then you will need to create a new account for your business. Please [go here](#)

Type the business name

ACME ABC

Search

Or

Select a letter to find the business in the list

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Select a Business

	Company Name	Address 1	City	State
<input type="radio"/>	ACME ABC	123 Energy Plaza Dr	Dallas	TX

Page 1

Register as an Admin >

Register as a User >

Cancel

Changed

3rd Party Registers for SMT

P1.1.2 Register as an admin for an existing 3rd Party &
P1.1.3 Register as a user for an existing 3rd Party

Texas Smart Metering - Register - Mozilla Firefox: IBM Edition

File Edit View History Bookmarks Tools Help

smartmetertexas.com https://test.smartmetertexas.com/smt/jsf

Texas Smart Metering - Register

SMART METER TEXAS™

Register

Home > Select Account Type > Step 1 >

Request Access to a 3rd Party Account - Step 2 of 2

*Indicates a required field

Business Information

Company Name ACME ABC

Personal Information

* First Name: Jane

Middle Initial:

* Last Name: Doe

Suffix:

Phone: Ext.:

* Account email address: user@acmeabc.com

* Re-enter email address: user@acmeabc.com

Security

* User ID: user1acme

Terms and conditions

WEBSITE TERMS AND CONDITIONS
Created: October 2010

These Website Terms and Conditions (these "Terms") set forth the terms and conditions for use of this website (this "Website") to gain access to the Smart Meter Texas (the "Web Portal"). In these Terms, "you" or "your" refers to any user of this Website, and "we" or "us" or "our" refers to the owner(s) or operator(s) of this Website.

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* ☐ I agree to use this web portal in accordance with the Terms and Conditions.

Done

Changed

3rd Party UI Experience

- REP - which includes ROR and 3rd Party capabilities
- 3rd Party only
- Permissions

3rd Party Only vs. REP Account Management Tab

3rd Party Only Accounts Management Tab

VS

REP Accounts Management Tab

Smart Meter Texas - Windows Internet Explorer provided by IBM

https://test.smartmetertexas.com/texas/wps/myportal/tut/p/c5/04_SB8K8xLLM9MSSzPy8xBz9CP0os3h3c1cPF09LWMLNwIH488Qg0I

File Edit View Favorites Tools Help

Convert Select

X Delicious web school jobs finance entertainment car travel SMTP foodrink favorites electronics ibm

Smart Meter Texas

Home My Account Usage Notices Help

SMART METER TEXAS™ Welcome, CNPA02 CNPA02 Log Out

Customer Meters (3rd Party)

Customer Agreements

HAN Device Messages

My Profile

Company Profile

Manage Users

Pending Approval

My Account / Search for Meter(s) (3rd Party)

Search for Meter(s)

Type a list of meters

* indicates a required field

* Select type of meter identified:

☒ ESI ID(s)

☐ Meter Number(s)

* Type one or more meter numbers:

Import Meter(s) from a file:

Browse Import

Search

Search Results

View Premise Information View Meter Information Export Information View HAN Devices

Showing 1 - 25 of 501 1 2 3 4 5 <--Previous | Next-->

	Customer▼	Email▼	Service Address▼	City▼	State▼	
<input checked="" type="checkbox"/>	MARK DALEY	akhandu@us.ibm.com	00001 BLUFF PARK	DALLAS	TX	1
<input type="checkbox"/>			00001 HARBORVIEW DR	ROCKWALL	TX	1
<input type="checkbox"/>			00001 HIGHLAND TER	999	TX	1

Smart Meter Texas - Windows Internet Explorer provided by IBM

https://test.smartmetertexas.com/texas/wps/myportal/tut/p/c5/04_SB8K8xLLM9MSSzPy8xBz9CP0os3h3c1cPF09LWMLNwIH488Qg0I

File Edit View Favorites Tools Help

Convert Select

X Delicious web school jobs finance entertainment car travel SMTP foodrink favorites electronics ibm

Smart Meter Texas

Home My Account Usage Notices Help

SMART METER TEXAS™ Welcome, CNPA02 CNPA02 Log Out

Customer Meters (ROR)

Customer Meters (3rd Party)

Customer Agreements

HAN Device Messages

My Profile

Company Profile

Manage Users

Pending Approval

My Account / Search for Meter(s) (ROR)

Search for Meter(s)

Type a list of meters

* indicates a required field

* Select type of meter identified:

☒ ESI ID(s)

☐ Meter Number(s)

* Type one or more meter numbers:

Import Meter(s) from a file:

Browse Import

Search

Search Results

View Premise Information View Meter Information Export Information View HAN Devices

Showing 1 - 25 of 501 1 2 3 4 5 <--Previous | Next-->

	Customer▼	Email▼	Service Address▼	City▼	State▼	
<input checked="" type="checkbox"/>	MARK DALEY	akhandu@us.ibm.com	00001 BLUFF PARK	DALLAS	TX	1
<input type="checkbox"/>			00001 HARBORVIEW DR	ROCKWALL	TX	1
<input type="checkbox"/>			00001 HIGHLAND TER	999	TX	1

3rd Party Only vs. REP Account Management Tab

Customer Meters (ROR) –Access for REPs to ESIIDs for active customers of that Retail Electric Provider. The REP will be able to:

- Search, Upload Search and View ESIIDs
- View and export Meter and Premise data for ESIIDs

Customer Meters (3rd Party) –Access for 3rd Parties to ESIIDs contained within active ongoing relationships between the 3rd Party and a customer. 3rd Party will be able to:

- Search, Upload Search and View ESIIDs
- View and export Meter and Premise data for ESIIDs
- View HAN devices, HAN device detail, Add/Remove HAN devices, Device History

Customer Agreements – Access to agreements formed by 3rd Parties

- View One-Time LOAs for Energy Data requests and status
- HAN Provisions and De-Provision requests and status
- View Ongoing Relationships and status
- Export Agreements Report
- Create One-Time LOA request
- Create HAN Device Provision request
- Create Ongoing Relationship request
- Resubmit an existing request

HAN Device Messages – Access to HAN message History

- Query SMT for HAN messaging history

My Profile–

- Standard SMT My Profile capabilities

Company Profile – (Admins-Edit access, Users-Read Only access)

- Standard SMT Company Profile capabilities PLUS
 - Edit Company Logo
 - Edit Green Seal (if needed)

Manage Users – (Admins Only)

- Standard SMT Manage User capabilities PLUS
 - Edit 3rd Party specific permissions (see REP vs 3rd Party permissions page)

Pending Approval – (Admins Only)

- Standard SMT Pending Approval capabilities PLUS
 - Edit 3rd Party specific permissions (see REP vs 3rd Party permissions page)

REP Accounts Management Tab

Smart Meter Texas - Windows Internet Explorer provided by IBM

https://test.smartmetertexas.com/texas/wps/myportal/tut/p/c5/04_5B8K8xLLM9MSSpPy8x8z9CP0os3h3c1cPF09LvwMLNwNH88Qg0f

File Edit View Favorites Tools Help

SMART METER TEXAS™ Welcome, CNPA02 CNPA02 Log Out

Home My Account Usage Notices Help

Customer Meters (ROR)

Customer Meters (3rd Party)

Customer Agreements

HAN Device Messages

My Profile

Company Profile

Manage Users

Pending Approval

My Account / Search for Meter(s) (ROR)

Search for Meter(s)

Type a list of meters

* indicates a required field

* Select type of meter identified: ☒ ESI ID(s) ☐ Meter Number(s)

* Type one or more meter numbers:

Import Meter(s) from a file:

Search Results

View Premise Information View Meter Information Export Information

Showing 1 - 25 of 501 1 2 3 4 5 <--Previous | Next-->

	Customer▼	Email▼	Service Address▼	City▼	State▼	
<input checked="" type="checkbox"/>	MARK DALEY	akhandu@us.ibm.com	00001 BLUFF PARK	DALLAS	TX	1
<input type="checkbox"/>			00001 HARBORVIEW DR	ROCKWALL	TX	1
<input type="checkbox"/>			00001 HIGHLAND TER	999	TX	1

Legend:

ROR capabilities

3rd Party capabilities

Shared capabilities

3rd Party Only vs. REP Usage Tab

3rd Party Only Usage Tab

VS

REP Usage Tab

Smart Meter Texas - Windows Internet Explorer provided by IBM

https://test.smartmetertexas.com/texas/wps/myportal/tut/p/c5/04_SB8K8xLLM9MSSzPy8xBz9CP0os3h3c1cPF09LWMLNwH4A88Qg0r

File Edit View Favorites Tools Help

Convert Select

X Delicious X web X school X jobs X finance X entertainment X car X travel X SMTP X foodrink X favorites X electronics X ibm

Smart Meter Texas

SMART METER TEXAS™ Welcome, CNPA02 CNPA02 Log Out

Home My Account Usage Notices Help

Customer Meters (3rd Party)
Report Request Status

Usage/ Usage Reports Search (3rd Party)

Usage Reports Search ?

* Indicates a required field.
Type a list of meters OR Import list of meters from a file.

*Select type of meter identifier:

☒ ESI ID
☐ Meter Number

Type one or more meter numbers:

Import Meter(s) from a file:

Search Browse... Import

Smart Meter Texas - Windows Internet Explorer provided by IBM

https://test.smartmetertexas.com/texas/wps/myportal/tut/p/c5/04_SB8K8xLLM9MSSzPy8xBz9CP0os3h3c1cPF09LWMLNwH4A88Qg0r

File Edit View Favorites Tools Help

Convert Select

X Delicious X web X school X jobs X finance X entertainment X car X travel X SMTP X foodrink X favorites X electronics X ibm

Smart Meter Texas

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Home My Account Usage Notices Help

Customer Meters (ROR)
Customer Meters (3rd Party)
Report Request Status

Usage/ Usage Reports Search (ROR)

Usage Reports Search ?

* Indicates a required field.
Type a list of meters OR Import list of meters from a file.

*Select type of meter identifier:

☒ ESI ID
☐ Meter Number

Type one or more meter numbers:

Import Meter(s) from a file:

Search Browse... Import

3rd Party Only vs. REP Usage Tab

REP Usage Tab

Customer Meters (ROR) –Access for REPs to ESIIDs for active customers of that Retail Electric Provider. The REP will be able to:

- Search, Upload Search and View ESIIDs
- View, download, and export energy data (.csv and Green Button)
- On Demand Reads

Customer Meters (3rd Party) –Access for 3rd Parties to ESIIDs contained within active ongoing relationships between the 3rd Party and a customer. 3rd Party will be able to:

- Search, Upload Search and View ESIIDs
- View, download, and export energy data (.csv and Green Button)
- On Demand Reads

Request Report Status – Access to agreements formed by 3rd Parties

- View processing status of exported energy usage ad hoc reports PLUS
- Updated to show difference between ROR and 3rd Party reports and identifying characteristics of the report (e.g. customer name)

Smart Meter Texas - Windows Internet Explorer provided by IBM

https://test.smartmetertexas.com/texas/wps/myportal/ut/p/c/04_SB8K3xLM9MSSaPy8x6z9CP0os3h3c1cPF09LYwMLNwH#1A88QgQd

File Edit View Favorites Tools Help

SMART METER TEXAS™ Welcome , CNPA02 CNPA02 Log Out

Home My Account Usage Notices Help

Customer Meters (ROR)
Customer Meters (3rd Party)
Report Request Status

Usage/ Usage Reports Search (ROR)

Usage Reports Search ?

* Indicates a required field.
Type a list of meters OR Import list of meters from a file.

*Select type of meter identifier:
☒ ESI ID
☐ Meter Number

Type one or more meter numbers:

Import Meter(s) from a file:

Search

Legend:
ROR capabilities
3rd Party capabilities
Shared capabilities

3rd Party Only vs. REP Permissions

Smart Meter Texas UI Portlets	REP Admins	REP Users	3 rd Party Admins	3 rd Party Users
My Account / Customer Meters (ROR)	Default Access	Default Access	Not Applicable	Not Applicable
My Account / Customer Meters (3 rd Party)	Default Access	Admin Granted	Default Access	Admin Granted
My Account / Customer Meters (3 rd Party) / HAN Devices	Default Access	Admin Granted	Default Access	Admin Granted
My Account / Customer Agreements (Usage)	Default Access	Admin Granted	Default Access	Admin Granted
My Account / Customer Agreements (HAN)	Default Access	Admin Granted	Default Access	Admin Granted
My Account / HAN Device Messages	Default Access	Admin Granted	Default Access	Admin Granted
My Account / My Profile	Default Access	Default Access	Default Access	Default Access
My Account / Company Profile	Default Access	Read Only Access	Default Access	Read Only Access
My Account / Manage Users	Default Access	Not Applicable	Default Access	Not Applicable
My Account / Pending Approval	Default Access	Not Applicable	Default Access	Not Applicable
Usage / Customer Meters (ROR)	Default Access	Default Access	Not Applicable	Not Applicable
Usage / Customer Meters (3 rd Party)	Default Access	Admin Granted	Default Access	Default Access

Permissions Granted to REP Users by REP Admins:

- ROR Usage – base level permissions
- 3rd Party Usage – must be granted
- 3rd Party HAN – must be granted

Permissions Granted to 3rd Party Users by 3rd Party Admins:

- 3rd Party Usage – must be granted
- 3rd Party HAN – must be granted

Permissions are initially granted by Admins to Users during the Pending Approval step of Registration and can be modified in Manage Users.

My Account / Customer Meters (ROR)

- Access for REPs to ESIIDs for active customers of that Retail Electric Provider.
- The REP will be able to:
 - Search, Upload Search and View ESIIDs
 - View and export Meter and Premise Data
- There are 2 views
 - List view (if there are 25 or less ESIIDs)
 - Search and Upload Search Page (if there are more than 25 ESIIDs)

Smart Meter Texas - Windows Internet Explorer provided by IBM

https://test.smartmetertexas.com/texas/wps/myportal/ut/p/c5/04_5B8K8xLLM9MSSpPy8x8z9CP0os3h3c1cPF09LWvMLNwNH88Qg0f

File Edit View Favorites Tools Help

Convert Select

Delicious web school jobs finance entertainment car travel SMTP foodrink favorites electronics ibm

Smart Meter Texas

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Welcome, CNPA02 CNPA02 Log Out

Home My Account Usage Notices Help

Customer Meters (ROR)

Customer Meters (3rd Party)

Customer Agreements

HAN Device Messages

My Profile

Company Profile

Manage Users

Pending Approval

My Account / Search for Meter(s) (ROR)

Search for Meter(s)

Type a list of meters

* indicates a required field

* Select type of meter identified:

☒ ESI ID(s)

☐ Meter Number(s)

* Type one or more meter numbers:

Import Meter(s) from a file:

Browse... Import

Search

Search Results

View Premise Information View Meter Information Export Information

Showing 1 - 25 of 501 1 2 3 4 5 <--Previous | Next-->

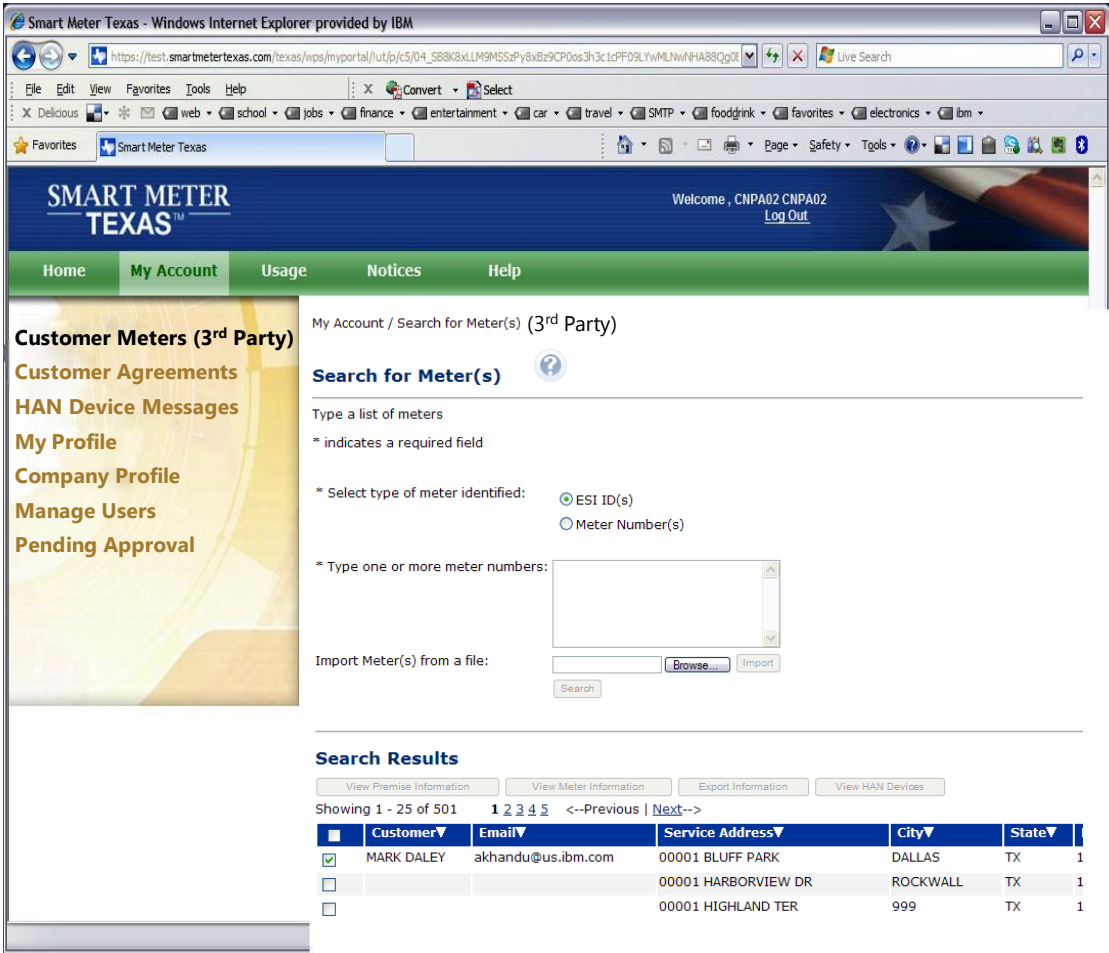
	Customer	Email	Service Address	City	State	
<input checked="" type="checkbox"/>	MARK DALEY	akhandu@us.ibm.com	00001 BLUFF PARK	DALLAS	TX	1
<input type="checkbox"/>			00001 HARBORVIEW DR	ROCKWALL	TX	1
<input type="checkbox"/>			00001 HIGHLAND TER	999	TX	1

Smart Meter Texas UI Portlets	REP Admins	REP Users	3 rd Party Admins	3 rd Party Users
My Account / Customer Meters (ROR)	Default Access	Default Access	Not Applicable	Not Applicable

My Account / Customer Meters (3rd Party)

Only Relevant for Ongoing Relationships

- Access for 3rd Parties to ESIIDs contained within active ongoing relationships between the 3rd Party and a customer.
- 3rd Party will be able to:
 - Search, Upload Search and View ESIIDs
 - By ESIID, Meter, Customer Last Name, Agreement #
 - View and export Meter and Premise data for ESIIDs
 - View HAN Devices
- There are 2 views
 - List view (if there are 25 or less ESIIDs)
 - Search and Upload Page (if there are more than 25 ESIIDs)



Smart Meter Texas UI Portlets	REP Admins	REP Users	3rd Party Admins	3rd Party Users
My Account / Customer Meters (3rd Party)	Default Access	Admin Granted	Default Access	Admin Granted

My Account / Customer Meters (3rd Party) / HAN Devices

- Access for 3rd Parties to HAN Devices contained within active ongoing relationships between the 3rd Party and a customer.
- 3rd Party will be able to:
 - Viewing HAN Devices by ESIID
 - Adds & Removes of HAN Devices
 - View HAN Device Details
 - View HAN Device History

Smart Meter Texas - Windows Internet Explorer provided by IBM

https://test.smartmetertexas.com/texas/wps/myportal/utlp/c5/04_S69K5xLLM9MSSzPy8x8z9CP00s3h3c1dPF09LYwMLNwH#H488Qg0

File Edit View Favorites Tools Help

Delicious web school jobs finance entertainment car travel SMTP fooddrink favorites electronics ibm

Smart Meter Texas

SMART METER TEXAS™ Welcome, CNPA02 CNPA02 Log Out

Home My Account Usage Notices Help

Customer Meters (ROR)
Customer Meters (3rd Party)
Customer Agreements
HAN Device Messages
My Profile
Company Profile
Manage Users
Pending Approval

My Account / [Search for Meter\(s\)](#) / HAN Devices (3rd Party)

HAN Devices - ESI ID 10443720008930057

Add a HAN Device View Details Remove HAN Device HAN Device History

	Type of HAN Device▼	Device Description▼	ESI ID▼	Status	Meter Number▼
<input type="checkbox"/>	Updating UEG Device		10443720008930057	Unknown Status	103261057
<input checked="" type="checkbox"/>	Updating UEG Device		10443720008930057	Unknown Status	103261057
<input type="checkbox"/>	Updating UEG Device		10443720008930057	Unknown Status	103261057

Add a HAN Device View Details Remove HAN Device HAN Device History

ESI ID History - Device Removes and Failures Over Last 10 Days

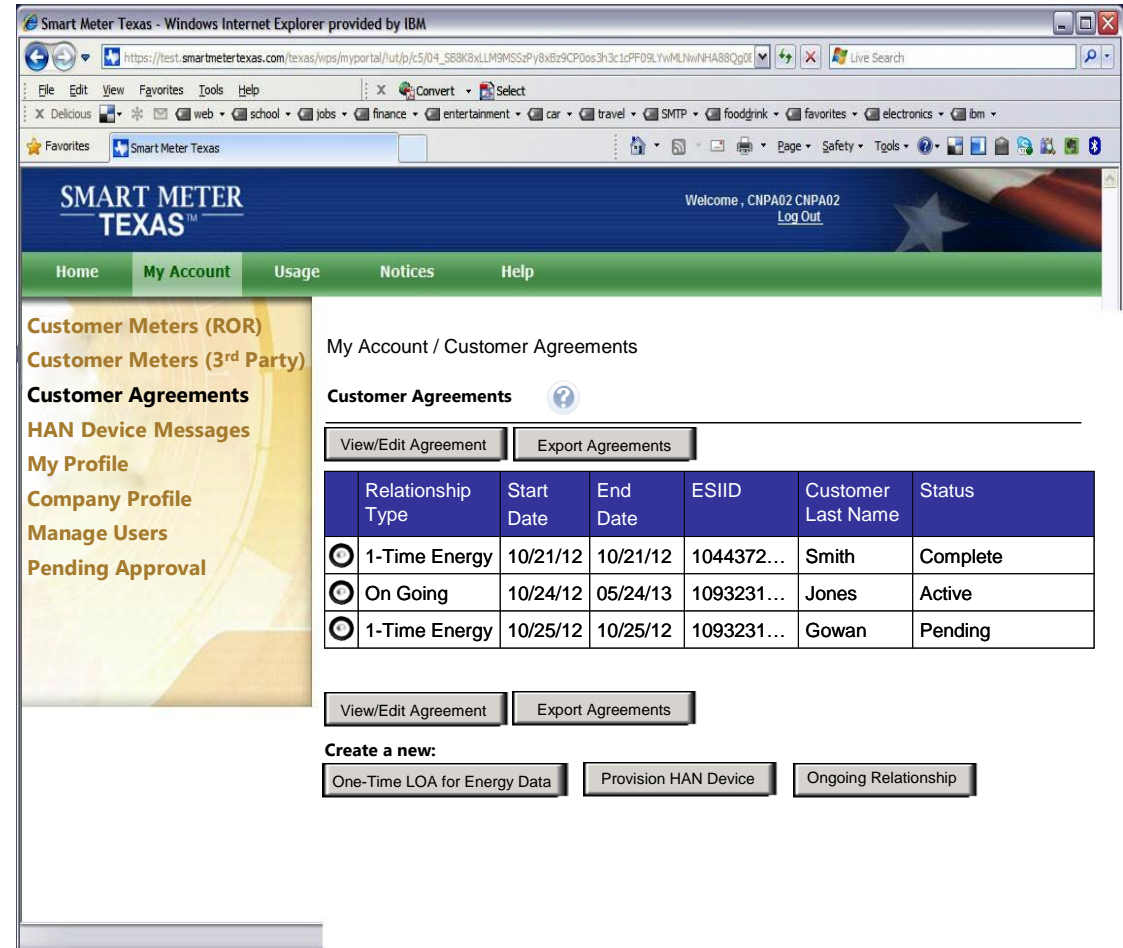
Date-Time	MAC Address	Type of HAN Device	Status	Sta
12/05/2011 12:18:05 PM	1234567890ABC001	In Home Display	Add Failed	The ,
12/05/2011 12:17:45 PM	1234567890ABC001	In Home Display	Add Acknowledged	Add
12/05/2011 12:17:41 PM	1234567890ABC001	In Home Display	Add Acknowledged	Add
09/18/2011 08:17:04 AM	1238587770ACD001		Unknown Status	Unkr
09/18/2011 07:46:38 AM	1238587890ACD001		Add Failed	The ,
09/18/2011 07:46:37 AM	1238587890ACD001		Add Failed	The ,
09/18/2011 07:46:35 AM	1238587890ACD001		Add Failed	The ,

Smart Meter Texas UI Portlets	REP Admins	REP Users	3rd Party Admins	3rd Party Users
My Account / Customer Meters (3rd Party) / HAN Devices	Default Access	Admin Granted	Default Access	Admin Granted

My Account / Customer Agreements (Usage and HAN)

Only Relevant for Ongoing Relationships

- Access to Customer Agreements formed by 3rd Parties
- 3rd Party will be able to:
 - Search for Customer Agreements
 - View One-Time LOAs for Energy Data requests and status
 - HAN Provisions and De-Provision requests and status
 - View Ongoing Relationships and status
 - Export Agreements Report
 - Create One-Time LOA for Energy Data request
 - Create HAN Device Provision request
 - Create Ongoing Relationship request
 - Resubmit an existing request
 - Ability to 'click to view' Meters, Usage and HAN devices
- There are 2 views
 - List view (if there are 25 or less agreements)
 - Search and Upload Page (if there are more than 25 agreements)



Smart Meter Texas UI Portlets	REP Admins	REP Users	3rd Party Admins	3rd Party Users
My Account / Customer Agreements (Usage)	Default Access	Admin Granted	Default Access	Admin Granted
My Account / Customer Agreements (HAN)	Default Access	Admin Granted	Default Access	Admin Granted

My Account / HAN Device Messages

Only Relevant for Ongoing Relationships

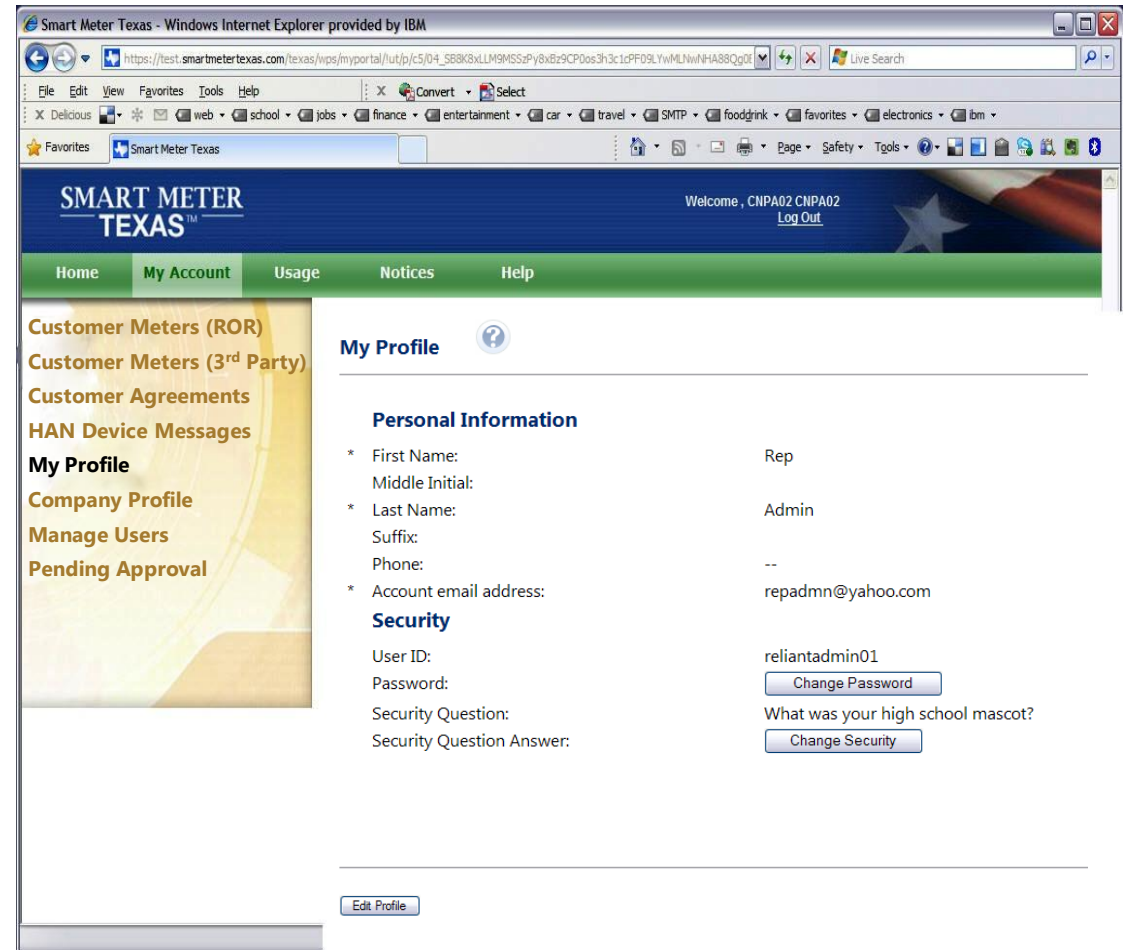
- Access to HAN message History sent by 3rd Parties
- 3rd Party will be able to:
 - Query SMT for HAN messaging history

The screenshot shows a web browser window titled "Smart Meter Texas - Windows Internet Explorer provided by IBM". The address bar shows a URL starting with "https://test.smartmetertexas.com". The page has a blue header with the "SMART METER TEXAS" logo and a "Welcome, CNPA02 CNPA02 Log Out" message. Below the header is a green navigation bar with links: Home, My Account, Usage, Notices, and Help. The "My Account" section is expanded, showing a list of links: Customer Meters (ROR), Customer Meters (3rd Party), Customer Agreements, HAN Device Messages, My Profile, Company Profile, Manage Users, and Pending Approval. The "HAN Device Messages - Request Message Log" form is displayed on the right. It includes a legend: "* indicates a required field". The form has three main sections: "Message Type" with checkboxes for Simple Text Message, Cancel Simple Text Message, Load Control Event, Cancel Load Control Event, Cancel All Load Control Events, and Price Message; "DUNS:" with a checkbox for DUNS Number and a text input field containing "799530915"; and "Date of Message:" with a text input field and a calendar icon. A "Submit Request" button is at the bottom.

Smart Meter Texas UI Portlets	REP Admins	REP Users	3 rd Party Admins	3 rd Party Users
My Account / HAN Device Messages	Default Access	Admin Granted	Default Access	Admin Granted

My Account / My Profile

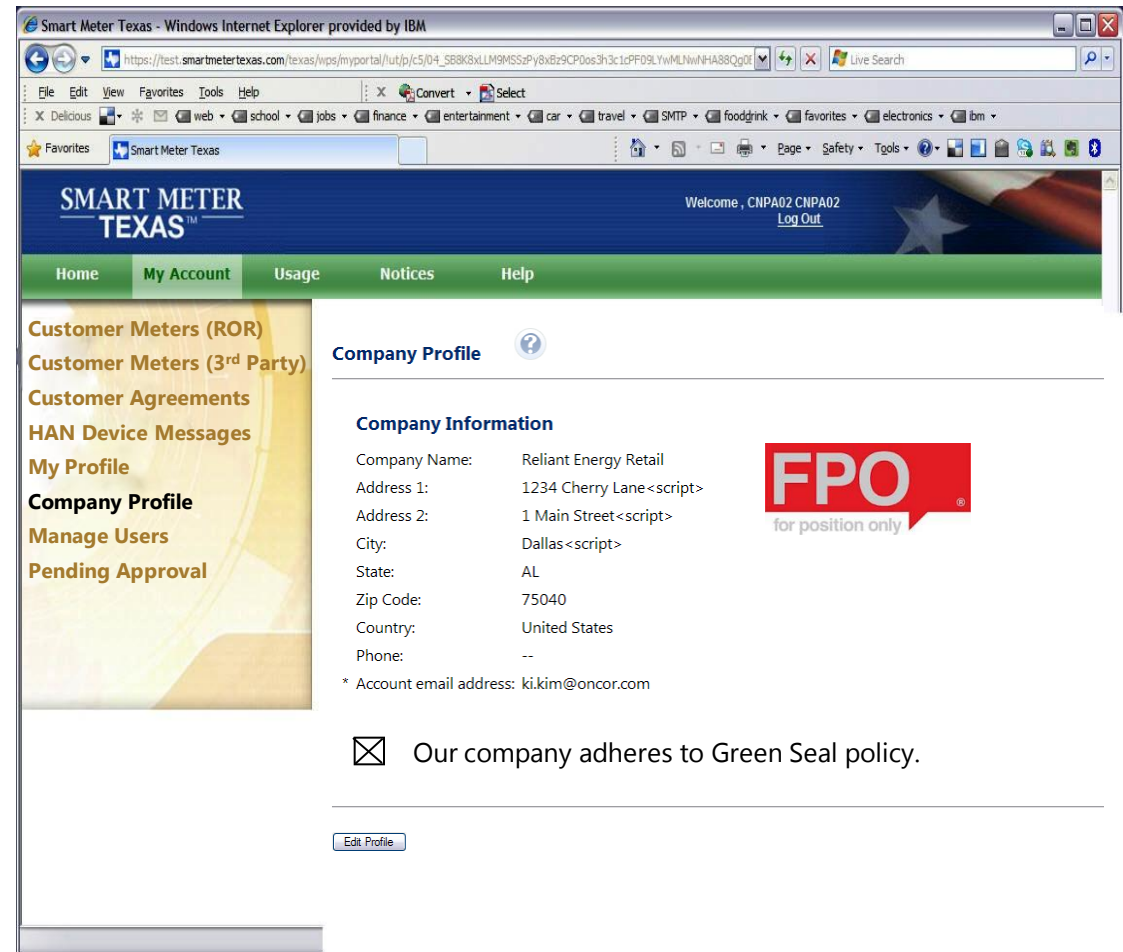
- Access user profile for all SMT users
- SMT users are able to:
 - Manage their user profile
 - View and update Personal information
 - Change web account password
 - Change web account security question



Smart Meter Texas UI Portlets	REP Admins	REP Users	3 rd Party Admins	3 rd Party Users
My Account / My Profile	Default Access	Default Access	Default Access	Default Access

My Account / Company Profile

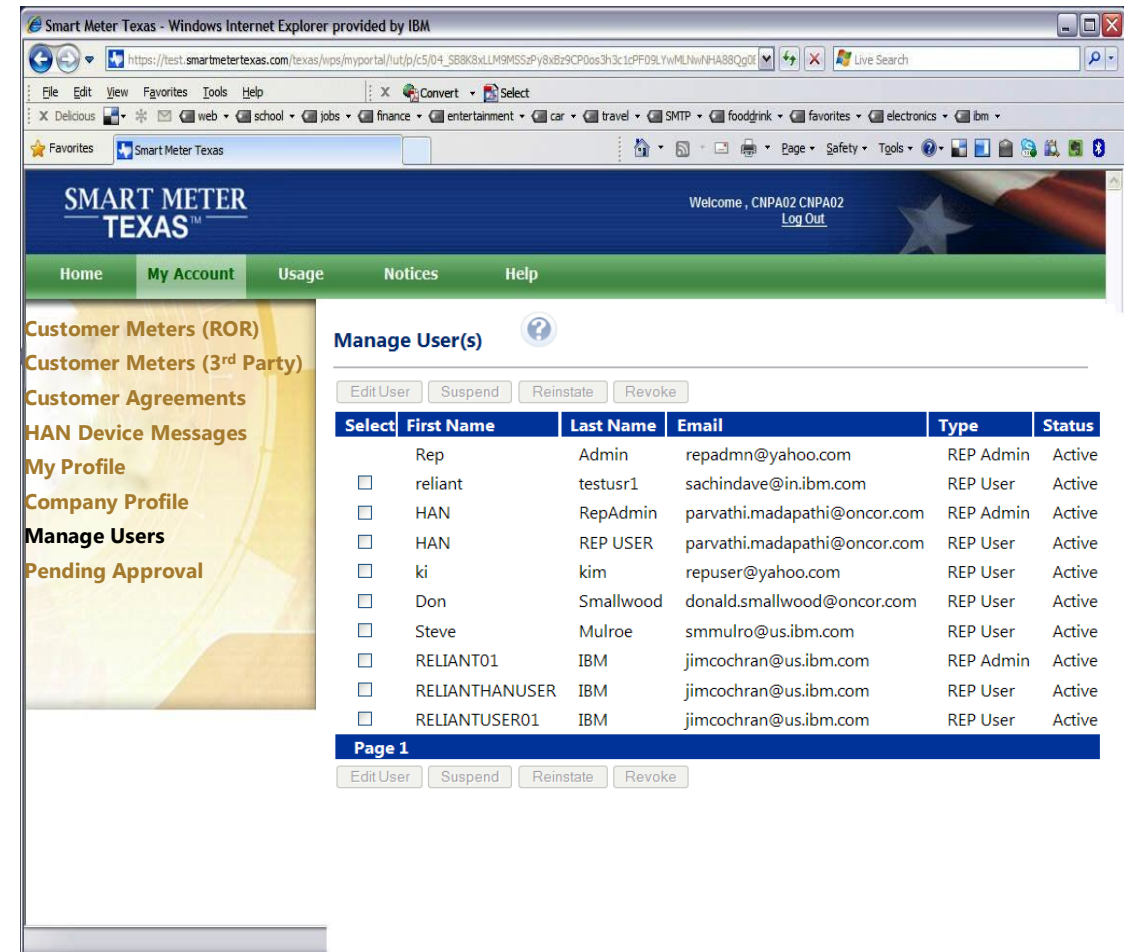
- Access Company profile for all SMT users
 - Admins have edit access
 - Users have read only access
- SMT Admins are able to:
 - Manage their company profile
 - View and update company information
- 3rd Party Admins will be able to update:
 - Company Logo
 - Green Seal checkbox



Smart Meter Texas UI Portlets	REP Admins	REP Users	3 rd Party Admins	3 rd Party Users
My Account / Company Profile	Default Access	Read Only Access	Default Access	Read Only Access

My Account / Manage Users

- Access Company profile for all SMT Admins
- Standard SMT Manage User capabilities
 - Admins can manage other Admins and users
 - Edit user permissions
 - Suspend admins and users
 - Reinstate admins and users
 - Revoke admins and users
- PLUS:
 - REPs
 - ROR Usage – base level permissions
 - 3rd Party Usage – must be granted
 - 3rd Party HAN – must be granted
 - DUNs Management
 - 3rd Parties
 - DUNs
 - 3rd Party Usage – base level permissions
 - 3rd Party HAN – must be granted
 - DUNs Management



Smart Meter Texas UI Portlets	REP Admins	REP Users	3 rd Party Admins	3 rd Party Users
My Account / Manage Users	Default Access	Not Applicable	Default Access	Not Applicable

My Account / Manage Users (cont')

- Access Company profile for all SMT Admins
- Standard SMT Manage User capabilities
 - Admins can manage other Admins and users
 - Edit user permissions
 - Suspend admins and users
 - Reinstate admins and users
 - Revoke admins and users
- PLUS:
 - REPs
 - ROR Usage – base level permissions
 - 3rd Party Usage – must be granted
 - 3rd Party HAN – must be granted
 - DUNs Management
 - 3rd Parties
 - 3rd Party Usage – base level permissions
 - 3rd Party HAN – must be granted
 - DUNs Management

Smart Meter Texas - Windows Internet Explorer provided by IBM

https://test.smartmetertexas.com/texas/wps/myportal/tut/p/c5/04_SB8K8xLLM9MSSzPy8xBz9CP0os3h3c1cPF09LYwMLNwNHA88Qg0f

File Edit View Favorites Tools Help X Convert Select

Delicious web school jobs finance entertainment car travel SMTP foodrink favorites electronics bm

Smart Meter Texas

SMART METER TEXAS™ Welcome, CNPA02 CNPA02 Log Out

Home My Account Usage Notices Help

Customer Meters (ROR)
Customer Meters (3rd Party)
Customer Agreements
HAN Device Messages
My Profile
Company Profile
Manage Users
Pending Approval

Manage Users >

User Account Details

* indicates a required field

Account Type: REP User
Account Status: Active

Personal Information

* First Name: Steve
Middle Initial:
* Last Name: Mulroe
Suffix:
Phone: --
* Account email address: smmulro@us.ibm.com

Permissions

DUNS: ☐ DUNs Number DUNs Status
☒ 799530915 Active

HAN Devices: ☒ Add and Remove HAN Devices

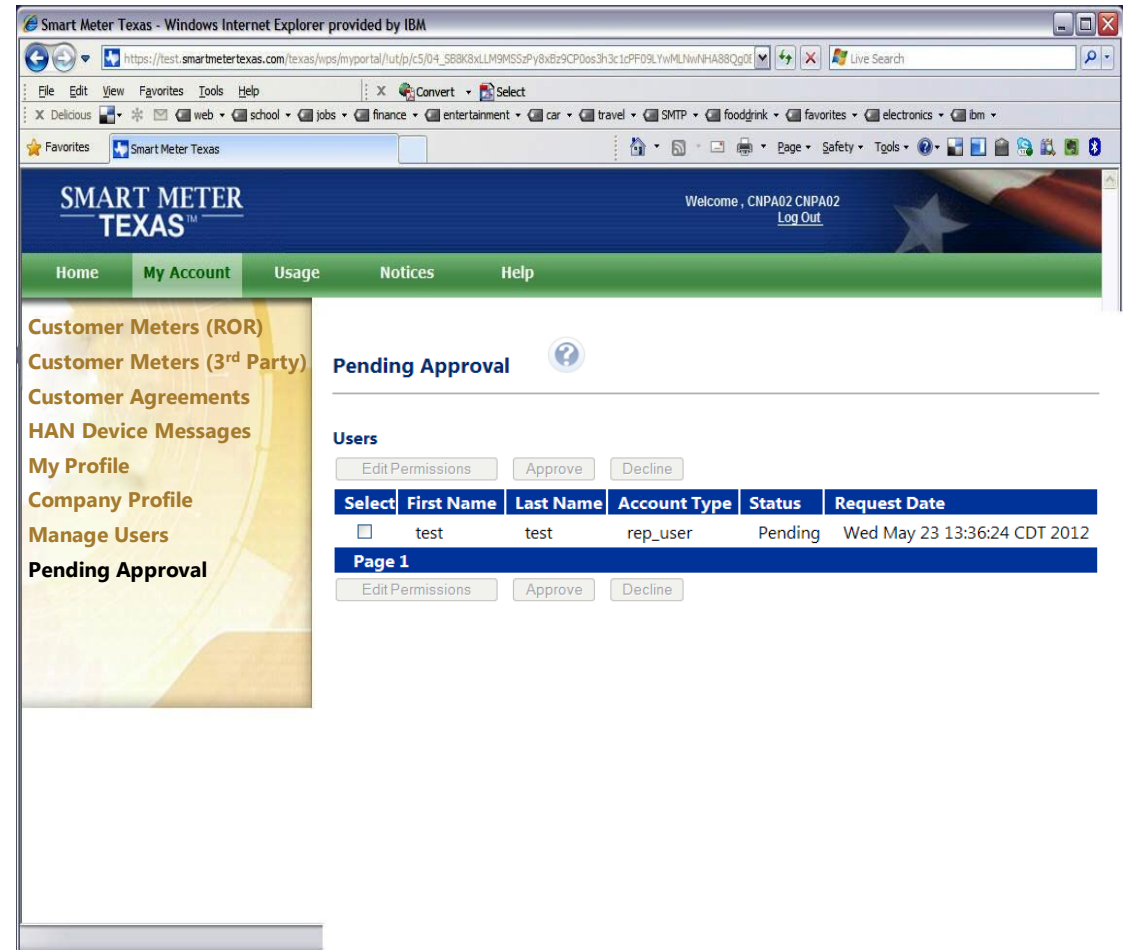
Action Type

* Access: Select Access
* Comments:

Smart Meter Texas UI Portlets	REP Admins	REP Users	3rd Party Admins	3rd Party Users
My Account / Manage Users	Default Access	Not Applicable	Default Access	Not Applicable

My Account / Pending Approval

- Access Company profile for all SMT Admins
- Standard SMT Pending Approval capabilities:
 - Edit Permissions
 - Approve
 - Decline
- PLUS:
 - REP Admins
 - ROR Usage – base level permissions
 - 3rd Party Usage – must be granted
 - 3rd Party HAN – must be granted
 - DUNs Management
 - 3rd Party Admins
 - 3rd Party Usage – base level permissions
 - 3rd Party HAN – must be granted
 - DUNs Management



Smart Meter Texas UI Portlets	REP Admins	REP Users	3rd Party Admins	3rd Party Users
My Account / Pending Approval	Default Access	Not Applicable	Default Access	Not Applicable

My Account / Pending Approval (cont')

- Access Company profile for all SMT Admins
- Standard SMT Pending Approval capabilities:
 - Edit Permissions
 - Approve
 - Decline
- PLUS:
 - REP Admins
 - ROR Usage – base level permissions
 - 3rd Party Usage – must be granted
 - 3rd Party HAN – must be granted
 - DUNs Management
 - 3rd Party Admins
 - DUNs
 - 3rd Party Usage – base level permissions
 - 3rd Party HAN – must be granted
 - DUNs Management

Smart Meter Texas - Windows Internet Explorer provided by IBM

https://test.smartmetertexas.com/texas/wps/myportal/tut/p/c5/04_SB8K8xLLM9MSSzPy8xBz9CP0os3h3c1cPF09LYwMLNwNHA88Qg0f

File Edit View Favorites Tools Help

Delicious Convert Select

Smart Meter Texas

SMART METER TEXAS™ Welcome, CNPA02 CNPA02 Log Out

Home My Account Usage Notices Help

Customer Meters (ROR)
Customer Meters (3rd Party)
Customer Agreements
HAN Device Messages
My Profile
Company Profile
Manage Users
Pending Approval

Pending Approval >

User Account Details ?

* indicates a required field.

Account Type: REP User
Status: Pending

Personal Information

* First Name: test
Middle Initial:
* Last Name: test
Suffix:
Phone:
* Account email address: jimcochran@us.ibm.com

Permissions

DUNS:

DUNs Number	DUNs Status
<input checked="" type="checkbox"/> 799530915	Active

☐ Add and Remove HAN Devices

HAN Devices:

Web Portal Access

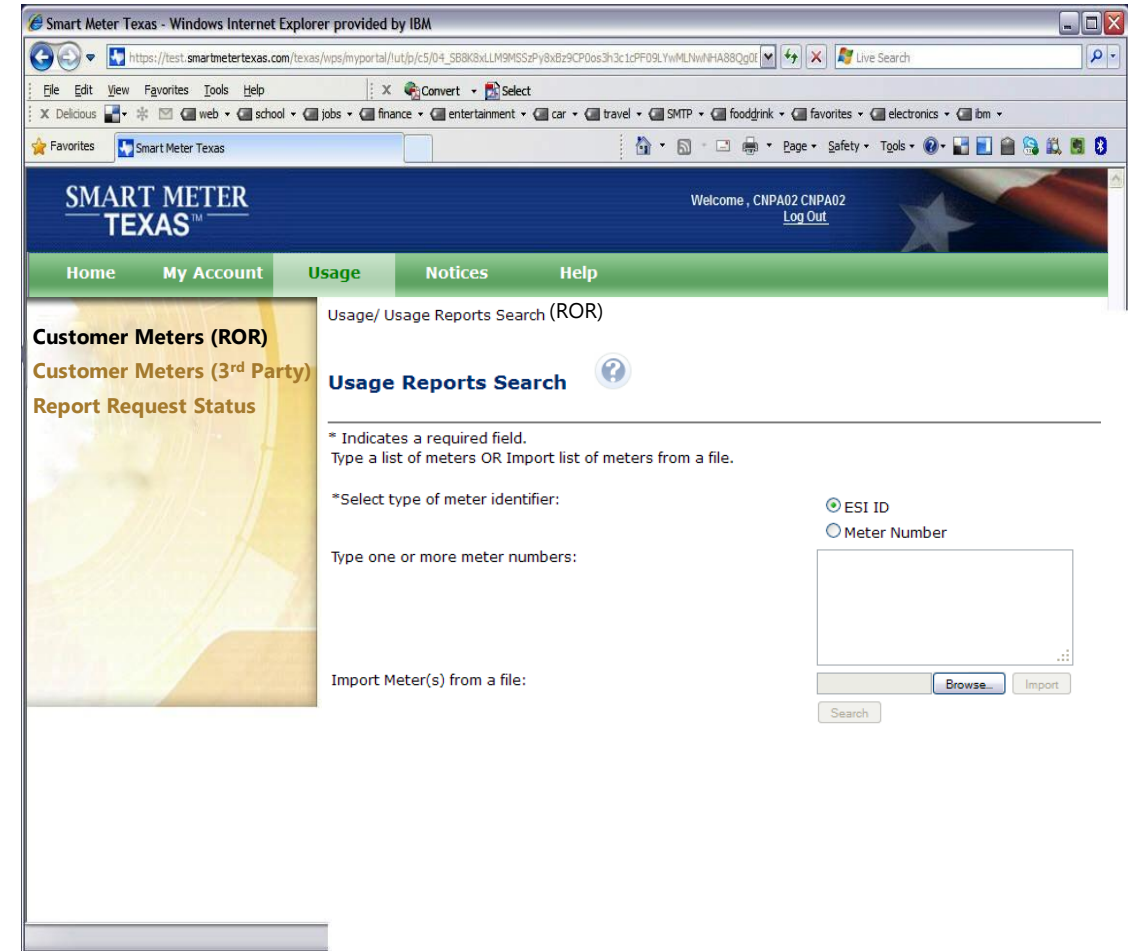
* Access: Select Access
Comments:

Save Account Cancel

Smart Meter Texas UI Portlets	REP Admins	REP Users	3rd Party Admins	3rd Party Users
My Account / Pending Approval	Default Access	Not Applicable	Default Access	Not Applicable

Usage / Customer Meters (ROR)

- **Customer Meters (ROR)** –Access for REPs to ESIIDs for active customers of that Retail
- Electric Provider. The REP will be able to:
 - Search, Upload Search and View ESIIDs
 - View, download, and export energy data (.csv and Green Button)
 - On Demand Reads

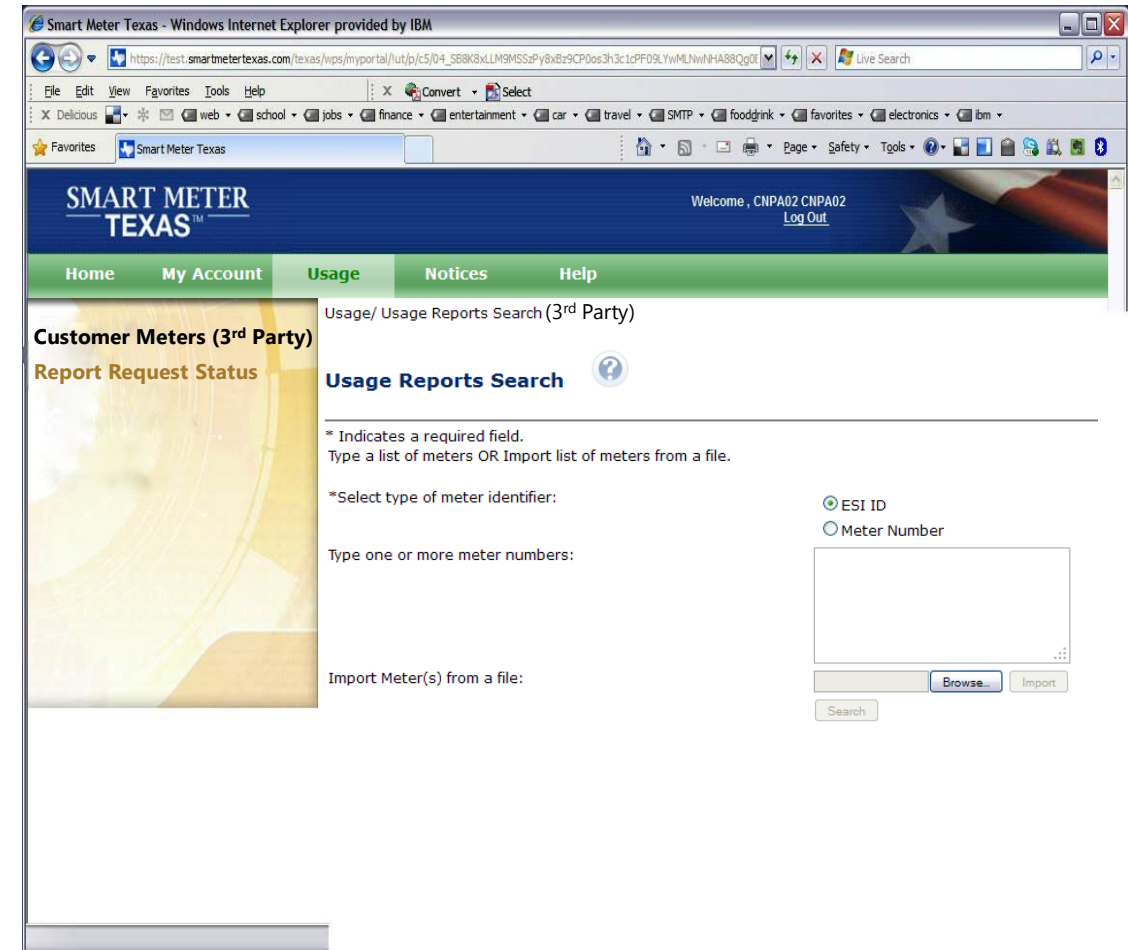


Smart Meter Texas UI Portlets	REP Admins	REP Users	3 rd Party Admins	3 rd Party Users
Usage / Customer Meters (ROR)	Default Access	Default Access	Not Applicable	Not Applicable

Usage / Customer Meters (3rd Party)

Only Relevant for Ongoing Relationships

- **Customer Meters (3rd Party)** –Access for 3rd Parties to ESIIDs contained within active
- ongoing relationships between the 3rd Party and a customer. 3rd Party will be able to:
 - Search, Upload Search and View ESIIDs
 - View, download, and export energy data (.csv and Green Button)
 - On Demand Reads



Smart Meter Texas UI Portlets	REP Admins	REP Users	3 rd Party Admins	3 rd Party Users
Usage / Customer Meters (3 rd Party)	Default Access	Admin Granted	Default Access	Admin Granted

Usage / Report Request Status

- **Request Report Status** – Access to agreements formed by 3rd Parties
 - View processing status of exported energy usage ad hoc reports PLUS
 - Updated to show difference between ROR and 3rd Party reports and identifying characteristics of the report (e.g. customer name)
 - There will be one left navigation element for this, but may have two tables (one for ROR and one for 3rd Party) or two tabs inside of the portlet to separate ROR from 3rd Party reports

Smart Meter Texas - Windows Internet Explorer provided by IBM

https://test.smartmetertexas.com/texas/wps/myportal/tut/p/c5/04_SB8K8xLLM9MSSzPy8xBz9CP0os3h3c1dPF09LWMLNwI#A88Qg0f

File Edit View Favorites Tools Help

Convert Select

X Delicious X web X school X jobs X finance X entertainment X car X travel X SMTP X foodrink X favorites X electronics X ibm

Smart Meter Texas

SMART METER TEXAS™

Welcome , CNPA02 CNPA02 [Log Out](#)

Home My Account **Usage** Notices Help

Customer Meters (ROR)
Customer Meters (3rd Party)
Report Request Status

Usage/ Report Request Status

Report Request Status ?

Date Requested	Order ID	Status	Details
05/29/2012	01db2b3f0919e937c7de92b5	Complete	Your report has been placed in your SMT FTP Folder
05/21/2012	fc04dfadae0a52dfc277c1f2	Complete	Your report has been placed in your SMT FTP Folder